LAW FIRM LAUNCH PROGRAMME · CLOSE THE MATTER AND LEARN FROM IT

Monthly review template

A five-minute page to fill in each month, so you can see what actually brings paying work.

01 This month at a glance

Fill this in on the same day each month. The habit matters more than precision.

Which month is this?

Total enquiries this month

How many became instructions (paying work)?

Roughly what was that work worth?

A rough figure is fine. You are looking for the trend.

02 Where enquiries came from

Split this month's enquiries across your channels.

Referrals and word of mouth

Search and your website

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Talk to us

Paid ads

Anywhere else

Add any source that does not fit above.

03 What actually converted

Which source produced the most paying work?

Which source produced enquiries that went nowhere?

04 What you'll change next month

One thing to do more of

One thing to stop or cut

One small thing to test

Cheap and quick, something you can judge in a month.

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